



Customer Case Study

Rest

Rest upgrades to an AWS cloud platform with enhanced customer experience

The Rest logo, consisting of the word "Rest" in a blue, rounded, sans-serif font, positioned inside a white square box.

Rest

Rest is a not-for-profit Australian superannuation fund, with all profits funnelled directly back to members. In operation for over 30 years, Rest is now among the largest funds in the country with two million members and over \$57 billion in funds under management. Rest offer their members low fees, investment choices, competitive, long-term performance and value-for-money insurance.

In March 2020, when work-from-home orders were issued by the New South Wales government in response to the COVID-19 pandemic, Rest engaged Versent to rapidly migrate their Advice team (qualified financial planners who provide guidance to Rest members) to a cloud telephony system, to enable them to effectively work remotely.

The Advice team was located at their Sydney CBD office, using a legacy, on-premise solution without any capability to route calls offsite. With the power of Amazon Connect and the AWS product ecosystem, Versent built and deployed a new voicemail solution in just two weeks.



UNPRECEDENTED CUSTOMER CHALLENGES

The sudden onset of COVID-19 in Australia necessitated a new service platform so that customer-facing financial advisory services – even more critical in the economic cliff of shut-down orders – could continue while keeping Rest employees safe in their homes. Rest had never faced an issue that caused an extended office closure, so, like the majority of companies globally, had to pivot their delivery model urgently.

Specific requirements of the cloud telephony solution include:

- › *Ensuring adherence to security and compliance standards and legislation, given the handling of Personally Identifiable Information (PII) data and the personal nature of the calls taken by the agents.*
- › *Setting up 15 full-time Advice agents with full work-from-home capabilities.*
- › *The ability to scale rapidly, to deal with increased traffic/enquiries from their members.*
- › *A foundation that allows for ongoing and future feature enhancements, and the ability to deploy, iterate and improve on, additional functionalities.*

RAPID DEPLOYMENT OF AMAZON CONNECT

Versent selected Amazon Connect, a seamlessly omni-channel, cloud-native contact centre solution, for Rest. Scalability, as well as the easy and quick set up and provisioning of the service, were key criteria for the establishment of a new cloud-based call centre solution for the customer. The solution was built using AWS native services on the Rest Enterprise Native Cloud platform.

"Rest understood that we could deliver the right solution quickly, ensuring their employees could work safely and effectively from home. They implicitly trust our team, which allowed them to remove many of the common processes and roadblocks, freeing us up to go as fast as we wanted." - Elmar Schippers, Principal Consultant, Versent.

"The ability to work from home has been the biggest benefit to our teams. With the shut-down of our offices due to COVID-19, and financial markets playing havoc to our customers' portfolios, being able to continue providing financial advice to them was critical. Versent got us there, and quickly."

Simon Smith,
General Manager Technology, Rest.



Versent's scope of work encompassed:

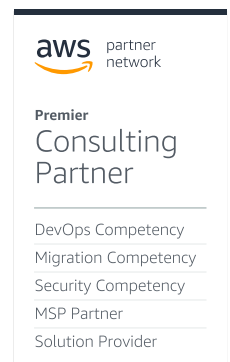
- > Building AWS accounts for the new Connect instance with SAML Authentication.
- > Migration of the Advice team to the new Amazon Connect instance (conducting training sessions, created as-built documentation, conducted go-live operations, knowledge transfer to Versent Managed Services).
- > Onboarding Rest employees.
- > Setting up contact flows, transitions & queues (error flows, call backflows, transcripts), call recording preferences, voicemail integration, user setup and permissions management.
- > Voicemail – creation of an AWS-native voicemail solution, including setup and customisation, team testing and training.
- > Setting up operational parameters – hours of operation, maximum queue length, permissions and authentication for agents, differing roles and administrators.
- > Post Go-Live support.

SECURITY AND PII COMPLIANCE

Given the personal nature of the Advice team's customer calls, recordings and transcripts fall under Personally Identifiable Information (PII) controls. In setting up the Connect instance, Versent had to maintain Rest's existing security posture to telephony and recorded calls, as well as provide access via SAML or user authentication in line with the organisation's current methods.

Data and Security mechanisms covered:

- > user role policies regarding access to Connect reporting and metrics, &
- > classification of recorded data; determining data storage, access, dissemination, encryption and deletion compliance required.



DEVOPS AGILITY UNDERPINS A SMOOTH ENGAGEMENT

As the need for a call centre solution for a remote, geographically dispersed workforce was almost immediate, Versent and Rest concurred on MVP functionalities which could then be deployed quickly.

Versent embraces the DevOps, agile methodology of software development - continuous iteration and quick code testing – ensuring a low-risk, rapid deployment and updates. Therefore, the Rest Advice team were able to operate and help customers sooner with the live MVP solution, whilst Versent continued to implement more value-added, rich features and functionalities:

- > *Integrated agent UI.*
- > *Call transcription.*
- > *Sentiment analysis.*
- > *Chatbot/click-to-chat/voice/SMS/email channel integrations.*
- > *Scheduled callbacks, & SMS notifications/triggers.*

The project took just three weeks from project kick-off to having the Advice team members conduct over-the-phone advisory calls on Amazon Connect. The entire project, including the development of more advanced features beyond the MVP, was completed two weeks later.

"Being our incumbent cloud transformation partner, Versent were acutely aware of the timely nature of this project. As such, they pulled out all stops and created a temporary (MVP) Amazon Connect solution in a single week. This rapid deployment enabled us to vacate our Advice team from our office, with zero interruption to our customer services."

Simon Smith,
General Manager Technology, Rest.



Versent facilitated and orchestrated training of Rest staff, including working with call agents on testing and QA. The continuous feedback loop meant that the Rest team were already familiar with the new system via demo flows before go-live and that any user issues were flagged early on in the development process, and fed back to engineering and management.

In addition, to guarantee a smooth cut-over process from the legacy solution to Connect, without impact on customer service availability, Versent worked closely with Rest on change management, jointly determining the criteria for rollback and roll forward options.

CLOUDOPS DRIVES WHOLE-OF-BUSINESS OPTIMISATION

Versent Managed Services (VMS) now supports and manages Rest's Amazon Connect system. This is a natural extension of the pre-existing 24/7/365 support, maintenance and management of Rest's entire AWS environment (ENC platform, API platform), including AWS cost management support, measurement of their compliance posture and ongoing enhancements, & improving CX through the provision of quality service management.

VMS was initially engaged with Rest in 2020, enabling the super fund to overcome a range of challenges, including:

- > *its shortage of up-to-date AWS expertise in-house,*
- > *a lack of visibility into AWS account configurations, assets and billing,*
- > *sub-optimal response to requests resulting in inefficient project deliveries, &*
- > *a lack of flexibility in providing support to ad hoc initiatives.*

"VMS, with our proactive site reliability engineering ethos, are constantly assessing Rest's AWS environment to uncover further opportunities for cost and performance optimisation.

VMS has a deep focus on automation and orchestration at scale, providing our clients with the freedom to run safely at speed. Through structured knowledge transfer, democratisation of data, VMS empowered Rest and provided ownership, so that Rest now has the internal skillsets to set and control their own digital modernisation destiny." - David Sharpe, Head of Services, Versent.

Through enablers such as AWS Systems Manager and AWS Trusted Advisor – helping to right-size, identify and remove redundant infrastructure; and more effectively schedule power and performance changes – VMS will continue to help Rest effectively manage their AWS expenditure.

BENEFITS AND KEY OUTCOMES

"Versent accurately articulated and documented our needs, and built a complete solution for us. Our previous telephony solution was a per-user pricing model – it was simply too expensive to onboard teams that would infrequently require call recording. With Amazon Connect's pay-per-minute pricing, we could bring on these teams, enabling a better customer and business experience, as well as benefit from a more cost-efficient billing model."

Simon Smith,
General Manager Technology, Rest.

Rapid time-to-service of Amazon Connect and subsequent improvements in call centre operations emerged from upfront alignment of expectations and requirements between the Rest and Versent teams. Versent facilitated scoping workshops on Day One, adopting a tight-communication model of continuous customer verification at every step of the project.

Three months after implementing Rest's solution, [Versent Managed Services](#) had enabled significantly improved service levels in both internal and external comm's. Versent installed real-time AWS spend and compliance dashboards that improved data democracy and transparency. These enabled data-driven decision-making by both Rest and VMS.

An AWS fee structure that better suited Rest's needs was a major efficiency improvement Versent implemented. It decoupled the AWS spend from Managed Services fees, thus allowing both companies to drive down AWS spend together on a continual basis.

A Versent engineer is always on site during business hours to augment Rest's support and delivery teams. This collaborative operational model has translated to faster response times (e.g. completion of provisioning tasks in minutes, whereas with Rest's previous MSP, even simple requests would take hours or days), as issues and requests are surfaced onsite to the VMS representative.

Accelerated in-flight projects are mounted without incurring additional costs through proactive Engineering hours provided by the Managed Service team to Rest. Leveraged proactive Engineering hours provide Rest with additional VPN services to support the surge in remote working resulting from COVID-19 lock downs.

Optimisation of Rest's existing AWS accounts with a cost and security lens (e.g. the rollout of a Cost Management Platform to provide billing transparency), drove extensive cost reductions. This was coupled with:


- > ongoing modernisation of the Rest AWS estate, &
- > reduced run costs and effort, with no servers or databases to maintain.

The Versent Managed Services implementation has facilitated improved Rest agent efficiency, with simplified workflows and skills-based task routing.

Overall, Versent managed Services at rest has meant a better experience for Rest customers, with seamless omni-channel communications. Alongside this better product experience is deeper insights into contact centre operation for Rest management, with access to powerful real-time analytics tools.


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Versent helps Service NSW digitise and secure state services with flexible API solution.